

## Purpose

This Job Aid is intended to outline where to locate text notifications in CMS, with dates and content of what was sent.

## Teams Impacted

- Customer Service
- Claim

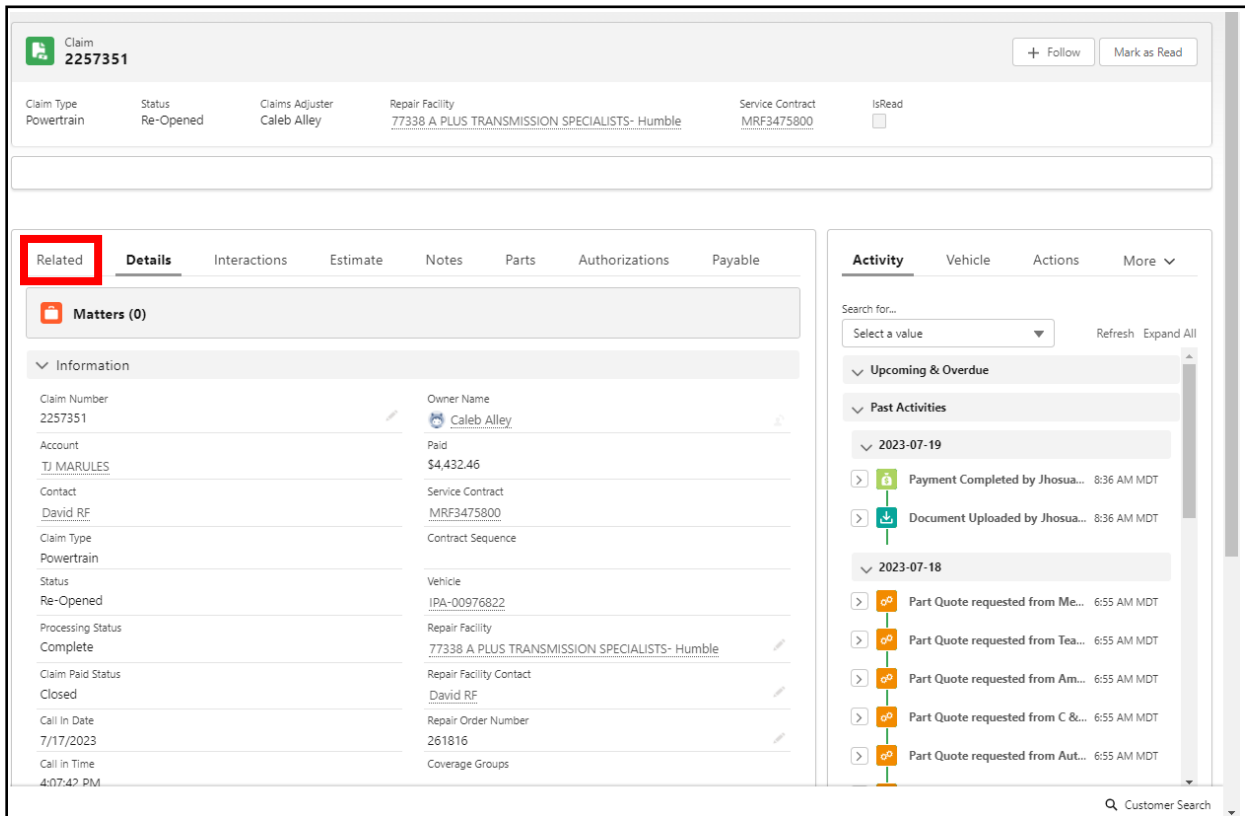
## Related References and Documents

- SOP: Claim Search in CMS

## Procedure

**Note.** Follow **SOP: Claim Search in CMS**.

1. Click on **[Related Tab]**



The screenshot displays the CMS interface for claim 2257351. The 'Related' tab is highlighted with a red box. The interface shows various tabs: Related, Details, Interactions, Estimate, Notes, Parts, Authorizations, and Payable. The 'Related' tab contains a section for 'Matters (0)' and an 'Information' section with details about the claim, including Claim Number, Account, Contact, Claim Type, Status, Processing Status, Claim Paid Status, Call In Date, and Call In Time. The 'Activity' section on the right shows a timeline of events, including 'Payment Completed by Jhosua...' and 'Document Uploaded by Jhosua...'. The 'Upcoming & Overdue' section shows 'Part Quote requested from Me...' and 'Part Quote requested from Tea...'.

2. Under SMS Section, Click **[View All]**.

Related

Details

Interactions


Estimate




Notes

Parts


Authorizations

Payable


 SMS (3)

SMS Number	Template Name	Status	Email Status
<a href="#">SMS230719-108012</a>	Final Invoice Paid SMS	Unverified	Queued 
<a href="#">SMS230718-105878</a>	Claim Approved SMS	Unverified	Queued 
<a href="#">SMS230717-104981</a>	New Claim	Unverified	Queued 
<div>View All</div>			

- a. The most recent text sent will be the very first one, you can confirm this by looking at the **Send Date**.

 Claims > 2257351 <b>SMS</b> 3 items • Sorted by Created Date • Updated 8 minutes ago									
<input type="checkbox"/>	SMS Num...	Template N...	Status	Email Status	Message	Direction	Send Date	Created ...	
1	<a href="#">SMS230719-10...</a>	Final Invoice Paid...	Unverified	Queued	Claim 2257351 with American Auto Shield: Your claim has been ...	Outgoing	7/19/2023, 8:36 ...	7/19/2023, 8:36 ...	
2	<a href="#">SMS230718-10...</a>	Claim Approved ...	Unverified	Queued	American Auto Shield Claim 2257351: Your claim for covered ite...	Outgoing	7/18/2023, 9:56 ...	7/18/2023, 9:56 ...	
3	<a href="#">SMS230717-10...</a>	New Claim	Unverified	Queued	Claim 2257351 with American Auto Shield was initiated by your ...	Outgoing	7/17/2023, 4:07 ...	7/17/2023, 4:07 ...	

- b. You can locate the reason for the notification under **Template Name**.




Claims > 2257351

SMS

3 items • Sorted by Created Date • Updated 14 minutes ago


	<input type="checkbox"/> SMS Number		Template Name	
1	<input type="checkbox"/> <a href="#">SMS230719-108012</a>		Final Invoice Paid SMS	
2	<input type="checkbox"/> <a href="#">SMS230718-105878</a>		Claim Approved SMS	
3	<input type="checkbox"/> <a href="#">SMS230717-104981</a>		New Claim	

- c. Select the **SMS Number** to see exactly what was sent in that text notification.

 <b>Claims &gt; 2257351</b> <b>SMS</b>		
3 items • Sorted by Created Date • Updated 10 minutes ago		
	SMS Num... ▾	Template N... ▾
1	SMS230719-10...	Final Invoice Paid...
2	SMS230718-10...	Claim Approved ...
3	SMS230717-10...	New Claim

3. You will land on the **SMS Details** screen; under message you can see what was sent.

2257351 | Claim
SMS
SMS2307...


**SMS**  
**SMS230719-108012**

New Lead and Referral Printable View

**Details**

Information

SMS Number

SMS230719-108012

Phone Number

+1832234310

Message

Claim 2257351 with American Auto Shield: Your claim has been paid to your shop less your deductible and any items that were not covered. Reply STOP to Opt Out.

Attachments

Is Batch Transaction

Debug

Send Date

7/19/2023, 8:36 AM

Message Segments

1

Owner

Jhosua Aguja

Direction

Outgoing

Status

Unverified

Scheduled Delivery

Batch Group ID

Message SID

**SMS History (1)**

Date:

7/19/2023, 8:36 AM

Field:

Created.

User:

Jhosua Aguja

Original Value:

New Value:

View All

**Files (0)**

Upload Files

Or drop files

**Notes & Attachments (0)**

Upload Files

Or drop files

**Note.** Below is a template that will show the SMS template names with how they are triggered to be sent along with the Verbiage used in the text notification.



## Job Aid: Text Notifications (SMS)

Text Name	Trigger	Verbiage
New Claim	Upon Claim Creation Claim Status = Open Claim Type = ANY except Roadside Only and Repair Sentry	Claim <Claim Number> with American Auto Shield was initiated by your repair facility. Please watch for updates during the claim process. Reply STOP to Opt Out.
Authorization	RF Authorization(s)  *Only 1 time per Calendar day, even if triggered more than once	Claim <Claim Number> with American Auto Shield has been approved! Reply STOP to Opt Out.
Inspection Set	Authorization of Inspection Claim Item  *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield has an inspection scheduled to verify coverage. A notification will be sent once it is completed. Reply STOP to Opt Out.
Inspection Completed	Inspection marked as reviewed  *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield: Inspection is complete. An adjuster will contact your repair facility to review the findings. Reply STOP to Opt Out.
Part(s) Ordered	When Part is ordered  *Only for the first part ordered on the claim, even if multiple parts ordered	Claim <Claim Number> with American Auto Shield: Part(s) have been ordered for your repair and will be at your repair facility soon. Reply STOP to Opt Out.
Final Invoice Paid	RF Payee is marked as Paid Status  *Only 1 time per calendar day, even if triggered more than once	Claim <Claim Number> with American Auto Shield: Your claim has been paid to your shop less your deductible and any items that were not covered. Reply STOP to Opt Out.
Service Records Needed	Send Request Button in Service Records Workflow (goes along with Service Records Email)  *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield: More information is needed for your claim. Look for an email for details and how to submit. Reply STOP to Opt Out.
General Update	Clicking the General Update Text Message Action Button in the Action Panel  Locked down for Carshield Users. Any other User will have permission to use the button.  *Only 1 time per calendar day.	Claim <Claim Number> with American Auto Shield: We have been trying to reach you about your claim. Please call us at xxx-xxx-xxxx. Reply STOP to Opt Out.  Note: Phone number is mapped from the Seller Claim Phone Number.

### Approval & Revision

Date Created 07/21/2023	Created By Charles Dunn	Date Approved 08/04/2023	Approved By Leonard Washington  Brian Coleman  Johnnie Martinez
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Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
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Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]